

CSB Program Requirements Matrix

The following table references the section headings used for the Evaluation Criteria on the CSB Program Requirements Matrix document with the wording stated on the Section M document.

#	CSB Evaluation Factors	Section M Evaluation Factor Descriptions
A	Evaluation	The Government will select the offer that is most advantageous to the Government, based upon an integrated assessment of Technical Expertise, Past Performance, Price and other factors considered. A Contract may be awarded to the offeror which is deemed responsible in accordance with the Federal Acquisition Regulation (FAR), as supplemented, whose proposal and statement of work conforms to the solicitation's requirements (to include all stated terms, conditions, representations, certifications, and all other information required by Section L of this solicitation) and is judged, based on the evaluation factors and subfactors to represent the best value to the Government. For this procurement, price will be a substantial factor in source selection, however, quality factors (including technical merit, past performance and small business participation), considered together are significantly more important than price. Proposals that are judged to contain major deficiencies will be considered nonresponsive and will not be considered for award.
B	Past Performance	<p>The past performance information collected from references and other sources will be evaluated against two factors:</p> <ol style="list-style-type: none"> 1. Relevance 2. Customer Satisfaction <p>The evaluation decision will focus on how well the offeror is expected to perform the proposed effort in terms of meeting overall program objectives and cost. More recent and relevant performance will have greater impact on the evaluation than less recent or relevant effort.</p>
C	Technical Proposal Evaluation Factors – Technical Excellence	<ol style="list-style-type: none"> 1. Provide prompt, responsive and accurate customer service 2. Optimize Portfolio Management (increase default recovery and asset performance) 3. Use resources effectively and efficiently, such as maximizing the integration of data and systems, the adaptability and the flexibility of systems and processes and the number and flexibility of tools available for customer service including the use of self-service methods, and leveraging current technology throughout the life of the contract (i.e. technology refreshment plan). 4. The proposed performance measures and incentives/disincentives (including incentives inherent in the pricing structure) will be evaluated based on the extent to which: <ol style="list-style-type: none"> a. The performance measures effectively monitor performance and reward quality performance and ensure continuous performance improvements. b. The contractor will bear the risk and cost of poor performance and commits to align its rewards and compensation to FSA's achievement of the objectives set forth in the SOO.
D	Business/ Price Proposal Evaluation Factors	<ul style="list-style-type: none"> • The proposed pricing will be evaluated on their completeness and reasonableness. The reasonableness of the overall price will be determined by adequate price competition, realism based on a demonstrated understanding of the SOO, and comparison to the Independent Government Cost Estimate. The offeror's proposed pricing will also be evaluated on the extent to which it avoids risks of undue costs to the Government resulting from volume variations or other changes. The offeror's proposed pricing should be compared to the technical proposal. • Small Business Participation <ol style="list-style-type: none"> 1. The offeror's proposal will be evaluated on the extent to which it utilizes small businesses to perform the work and contributes to ED's small business participation goals as set forth in Section L. 2. Offerors' proposals will be evaluated on: <ol style="list-style-type: none"> a. The extent to which offeror's small business targets contribute to Educations Small Business goals. b. The commitment and approach to providing meaningful subcontracting opportunities for small business concerns, small disadvantaged business concerns, woman-owned small business concerns, small disadvantaged veteran-owned business concerns and HUBZone businesses. c. The ability to meet the proposed subcontracting goals each year.

Source Selection Information -- See FAR 2.101 and FAR 3.104

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CSB Program Requirements Matrix Key

#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments
				Evaluation			
				Past Performance	Technical Excellence	Business/ Price Proposal	
#	Technical, Business, Past Performance or General Instructions	Provide reference to Section L contents	Provide reference to applicable SOO Section(s)	Identify if the section is applicable to the Past Performance evaluation criteria and its evaluation factors: - Relevance - Customer Satisfaction	Identify if the section is applicable to the Technical Excellence evaluation criteria and its evaluation factors: - Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources - Incentives/Disincentives	Identify if the section is applicable to the Business/ Price Proposal evaluation criteria and its evaluation factors: - Price - Small Business Participation	Provide any gaps and/or deficiencies identified. Include any other relevant comments

Source Selection Information -- See FAR 2.101 and FAR 3.104

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#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments	
				Evaluation				
				Past Performance	Technical Excellence	Business/ Price Proposal		
1	General Instructions	L.1 Order of Precedence (Solicitation)	No Evaluation Necessary					N/A
2	General Instructions	L.2 Type of Contract	No Evaluation Necessary					N/A
3	General Instructions	L.3 General Instructions	No Evaluation Necessary					N/A
4	Technical	L.4 1. Introduction	Section 1.1.1 FSA’s Business Challenge Section 1.1.2 FSA Integration Efforts Section 1.2 Common Services for Borrowers (CSB) Initiative	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources - Incentives/Disincentives	N/A	Technical Merit is of significant importance and will be considered along with Past Performance and Small Business Participation as a quality factor.	
5	Technical	L.4 2/3.SOW/WBS - Integrated Technical Environment	Section 1.3 Integrated Technical Environment	N/A	- Optimize Portfolio Management - Effective and Efficient Use of Resources	N/A	N/A	
6	Technical	L.4 2/3 SOW/WBS - Data Management	Section 2.2.1 Data Management	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources	N/A	N/A	
7	Technical	L.4 2/3. SOW/WBS - Transaction Processing	Section 2.2.2 Transaction Processing	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources	N/A	N/A	
8	Technical	L.4 2/3. SOW/WBS - Payment Processing	Section 2.2.3 Payment Processing	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources	N/A	N/A	

Source Selection Information -- See FAR 2.101 and FAR 3.104

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#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments
				Evaluation			
				Past Performance	Technical Excellence	Business/ Price Proposal	
9	Technical	L.4 2/3. SOW/WBS - Fulfillment	Section 2.2.4 Fulfillment Section 2.2.2 Transaction Processing	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources	N/A	N/A
10	Technical	L.4 2/3. SOW/WBS - Document Management	Section 2.2.5 Document Management	N/A	- Effective and Efficient Use of Resources	N/A	N/A
11	Technical	L.4 2/3. SOW/WBS - Recovery and Resolution	Section 2.2.6 Recovery and Resolution Section 2.2.9 Delinquency Management	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources - Incentives/Disincentives	N/A	N/A
12	Technical	L.4 2/3. SOW/WBS - Customer Relationship Management (CRM)/ Customer Interaction	Section 2.2.7 Customer Relationship Management (CRM)/ Customer Interaction	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources - Incentives/Disincentives	N/A	N/A
13	Technical	L.4 2/3. SOW/WBS - Performance Management	Section 2.2.8 Performance Management	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources - Incentives/Disincentives	N/A	N/A
14	Technical	L.4 2/3. SOW/WBS - Delinquency Management	Section 2.2.9 Delinquency Management Section 2.2.6 Recovery and Resolution	N/A	- Optimize Portfolio Management - Effective and Efficient Use of Resources	N/A	N/A

Source Selection Information -- See FAR 2.101 and FAR 3.104

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#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments
				Evaluation			
				Past Performance	Technical Excellence	Business/ Price Proposal	
15	Technical	L.4 2/3. SOW/WBS - Program Management	Section 2.2.10 Program Management	N/A	- Optimize Portfolio Management - Effective and Efficient Use of Resources	N/A	N/A
16	Technical	L.4 2/3. SOW/WBS - Hosting	Section 2.3.1 Hosting	N/A	- Effective and Efficient Use of Resources	N/A	N/A
17	Technical	L.4 2/3. SOW/WBS - Application and System Software Maintenance	Section 2.3.2 Application and System Software Maintenance	N/A	- Effective and Efficient Use of Resources - Incentives/Disincentives	- Price	N/A
18	Technical	L.4 2/3. SOW/WBS - Security	Section 2.3.3 Security	N/A	- Prompt, Responsive and Accurate Customer Service - Effective and Efficient Use of Resources	N/A	N/A
19	Technical	L.4 2/3. SOW/WBS - Quality Assurance (QA)	Section 2.3.4 Quality Assurance (QA) Section 2.2.8 Performance Management	- Customer Satisfaction (i.e., CMMI and/or ISO)	- Prompt, Responsive and Accurate Customer Service - Effective and Efficient Use of Resources - Incentives/Disincentives	N/A	N/A
20	Technical	L.4 2/3. SOW/WBS - Training	Section 2.3.5 Training	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources	N/A	N/A
21	Technical	L.4 2/3. SOW/WBS - Documentation	Section 2.3.6 Documentation	N/A	- Effective and Efficient Use of Resources	N/A	N/A
22	Technical	L.4 2/3. SOW/WBS - Transition	Section 2.3.7 Transition	N/A	- Prompt, Responsive and Accurate Customer Service - Effective and Efficient Use of Resources - Incentives/Disincentives	N/A	N/A

Source Selection Information -- See FAR 2.101 and FAR 3.104

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#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments
				Evaluation			
				Past Performance	Technical Excellence	Business/ Price Proposal	
23	Technical	L.4 4. Performance Management and Quality Assurance	Section 2.2.8 Performance Management Section 2.3.4 Quality Assurance (QA)	N/A	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources - Incentives/Disincentives	N/A	N/A
24	Technical	L.4 5. Management, Staffing, and Scheduling	Section 2.3.5 Training Section 2.3.7 Transition Section 2.2.8 Performance Management Section 1.2 Common Services for Borrowers (CSB) Initiative	N/A	- Prompt, Responsive and Accurate Customer Service - Effective and Efficient Use of Resources	N/A	N/A
25	Technical	L.4 6. Qualifications and Availability of Project Personnel	Section 2.3.5 Training Section 2.3.7 Transition Section 1.2 Common Services for Borrowers (CSB) Initiative	N/A	- Prompt, Responsive and Accurate Customer Service - Effective and Efficient Use of Resources - Incentives/Disincentives	N/A	N/A

Source Selection Information -- See FAR 2.101 and FAR 3.104

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#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments
				Evaluation			
				Past Performance	Technical Excellence	Business/ Price Proposal	
26	Technical	L.4 7. Organizational Experience	Section 2.3.4 Quality Assurance (QA) Section 2.3.5 Training Section 2.2.8 Performance Management Section 1.2 Common Services for Borrowers (CSB) Initiative	- Relevance - Customer Satisfaction	- Prompt, Responsive and Accurate Customer Service - Effective and Efficient Use of Resources	N/A	N/A
27	Business	L.5 A. Standard Form 33 “Solicitation, Offer, and Award”	Standard Form. No Evaluation Necessary				N/A
28	Business	L.5. B. Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data, Alternate IV from FAR 52.215-20	N/A	N/A	N/A	- Price	Please see Section L.6 for evaluation of the price proposal.

Source Selection Information -- See FAR 2.101 and FAR 3.104

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#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments
				Evaluation			
				Past Performance	Technical Excellence	Business/ Price Proposal	
29	Business	L.5 C. Property and Equipment	Section 2.3.1 Hosting Section 2.3.3 Security Section 2.2.7.2 Call Center (Customer Service Representative) Appendix D - Current Federal Student Aid Assets	N/A	N/A	- Price	The SOO does not provide an all-encompassing list of government furnished property, only a listing of certain relevant assets, such as the web sites and data marts. More detail or examples should be provided explicitly in Section L or the SOO. For example, postage meters are not mentioned at all.
30	Business	L.5 D. Other Administrative Details	No Evaluation Necessary				N/A
31	Business	L.5 E.1 Statement to Establish Offeror’s Financial Capability	Section 2.2.8 Performance Management	- Relevance	- Effective and Efficient Use of Resources - Incentives/Disincentives	- Price	N/A
32	Business	L.5 E.2 Statement to Establish Offeror’s Capability to Meet Delivery or Performance Schedules	Section 2.2.8 Performance Management Section 2.3.4 Quality Assurance	- Relevance - Customer Satisfaction	- Effective and Efficient Use of Resources - Incentives/Disincentives	- Price	Information should be reviewed in conjunction with Past Performance Report; May be redundant or may reveal inconsistencies in Offeror's Record or Capabilities

Source Selection Information -- See FAR 2.101 and FAR 3.104

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#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments
				Evaluation			
				Past Performance	Technical Excellence	Business/ Price Proposal	
33	Business	L.5 E.3 Statement of Offeror’s Record of Past Performance	Section 2.2.8 Performance Management	- Relevance - Customer Satisfaction	- Prompt, Responsive and Accurate Customer Service - Optimize Portfolio Management - Effective and Efficient Use of Resources	- Price	Information should be reviewed in conjunction with Past Performance Report; May be redundant or may reveal inconsistencies in Offeror's Record or Capabilities
34	Business	L.5 E.4 Statement of Offeror’s Record of Business Integrity	Section 2.2.8 Performance Management Section 2.3.3 Security Section 2.3.4 Quality Assurance	- Relevance - Customer Satisfaction	- Prompt, Responsive and Accurate Customer Service - Effective and Efficient Use of Resources - Incentives/Disincentives	- Price	Information should be reviewed in conjunction with Past Performance Report; May be redundant or may reveal inconsistencies in Offeror's Record or Capabilities
35	Business	L.5 E.5 Statement of Offeror’s Necessary Organizational Experience, Technical Skills, or the Ability to Obtain Them	Section 2.2.8 Performance Management	- Relevance - Customer Satisfaction	- Effective and Efficient Use of Resources	- Price	Information should be reviewed in conjunction with Past Performance Report; May be redundant or may reveal inconsistencies in Offeror's Record or Capabilities
36	Business	L.5 E.6 Statement of Offeror’s Possession of Necessary Facilities, or the Ability to Obtain Them	Section 2.3.1 Hosting Section 2.2.7.2 Call Center (CSR) Section 2.3.3 Security	- Relevance - Customer Satisfaction	- Effective and Efficient Use of Resources	- Price	N/A

Source Selection Information -- See FAR 2.101 and FAR 3.104

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#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments
				Evaluation			
				Past Performance	Technical Excellence	Business/ Price Proposal	
37	Business	L.5 E.7 Statement of Offeror’s Compliance with Subcontractor Requirements	Section 2.2.8 Performance Management Section 2.3.5 Training	- Relevance - Customer Satisfaction	- Effective and Efficient Use of Resources - Incentives/Disincentives	- Price - Small Business Participation	No other subcontract requirements other than small business participation appear in this solicitation.
38	Business	L.5 E.8 Other Special Considerations	N/A	This factor may apply	This factor may apply	This factor may apply	N/A
39	Business	L.6 Price Proposal	Section 1.2 Common Services for Borrowers (CSB) Initiative Section 2.3.2 Application and System Software Maintenance	N/A	- Incentives/Disincentives	- Price - Small Business Participation	Price is a substantial factor that will be reviewed and balanced against the Technical Proposal and Past Performance to help determine Best Value to the Government.
40	Business	L.7 Small Business Participation	N/A	N/A	- Effective and Efficient Use of Resources - Incentives/Disincentives	- Price - Small Business Participation	This has been stated as a goal for CSB, but is not mentioned in the SOO.
41	General Instructions	L.8 Use of Javits Wagner O’Day Affiliated Vendors	Section 2.2.7.2 Call Center (CSR)	N/A	- Prompt, Responsive and Accurate Customer Service - Effective and Efficient Use of Resources	- Price - Small Business Participation	N/A
42	General Instructions	L.9 Forms Clearance Process	No Evaluation Necessary				N/A
43	General Instructions	L.10 Clarification Questions	No Evaluation Necessary				N/A
44	General Instructions	L.11 Provision for Evaluation Factor Amendments	No Evaluation Necessary				N/A

Source Selection Information -- See FAR 2.101 and FAR 3.104

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#	Proposal Type	Section L Proposal Instructions	Statement of Objectives (SOO)	Section M Evaluation Criteria			Gaps and Other Comments	
				Evaluation				
				Past Performance	Technical Excellence	Business/ Price Proposal		
45	General Instructions	L.12 Comments on Small Business Regulatory Enforcement	No Evaluation Necessary					N/A
46	Past Performance	L.13 Past Performance Report	N/A	- Relevance - Customer Satisfaction	N/A	N/A	Past Performance is of significant importance in assessing the Government’s confidence in the Offeror’s ability to succeed in achieving the Strategic Objectives of CSB.	
47	General Instructions	L.14 Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data, Alternate IV	N/A	N/A	N/A	- Price - Small Business Participation	Please see Section L.6 for evaluation of the price proposal.	
48	General Instructions	L.15 Reserved	No Evaluation Necessary					N/A
49	General Instructions	L.16 Preaward On-Site Equal Opportunity Compliance Evaluation	No Evaluation Necessary					N/A
50	General Instructions	L.17 Availability of Funds	Section 1.2 Common Services for Borrowers (CSB) Initiative	N/A	N/A	-Price	Even though the funds are not presently available for this contract the offeror will be evaluated on the proposed pricing, specifically as it provides an “awardable amount” to the Government.	

Source Selection Information -- See FAR 2.101 and FAR 3.104

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				Evaluation			
				Past Performance	Technical Excellence	Business/ Price Proposal	
51	General Instructions	L.18 Submission of Electronic Funds Transfer Information with Offer	No Evaluation Necessary			N/A	
52	General Instructions	L.19 Service of Protest	No Evaluation Necessary			N/A	
53	General Instructions	L.20 Protests to the Agency	No Evaluation Necessary			N/A	
54	General Instructions	L.21 Evaluation of Options	No Evaluation Necessary			N/A	
55	General Instructions	L.22 Instructions to Offerors – Competitive Acquisition – Alternate I	No Evaluation Necessary			Guidelines set forth in this section will be key in determining an Offeror’s responsiveness and attention to detail.	